



GOVERNMENT OF INDIA
DEPARTMENT OF COMMERCE
INTERIM REPORT
OF THE
INDIAN TARIFF BOARD
ON THE
COTTON TEXTILE MACHINERY INDUSTRY

BOMBAY 1947

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सत्यमेव जयते

INTERIM REPORT ON COTTON TEXTILE MACHINERY INDUSTRY

1. An application for the protection of cotton textile machinery (ring frames, spindles and spinning rings) was made to the
Reference to the Board Commerce Department of the Government of India by the Textile Machinery Corporation, Ltd., Balghurriah (Calcutta), on the 4th December 1945. The case of this industry was referred to the Tariff Board for investigation by the Government of India (Department of Commerce) in their Resolution No. 218-T(55)/45, dated the 13th July 1946.

2. Under the terms of reference, which are stated in paragraph 5 of the
Terms of Reference Resolution No. 218-T(55)/45 of the Commerce Department, dated the 3rd November 1945, the Board has to report whether the industry satisfies the following conditions :—

(1) that it is established and conducted on sound business lines ; and

(2) (a) that, having regard to the natural or economic advantages enjoyed by the industry and its actual or probable costs, it is likely within a reasonable time to develop sufficiently to be able to carry on successfully without protection or State assistance ; or

(b) that it is an industry to which it is desirable in the national interest to grant protection or assistance and that the probable cost of such protection or assistance to the community is not excessive. Where a claim to protection or assistance is found to be established, *i.e.*, if condition (1) and condition (2) (a) or (b) are satisfied, the Board has to recommend (i) whether, at what rate and in respect of what articles, or class or description of articles, a protective duty should be imposed ; (ii) what additional or alternative measures should be taken to protect or assist the industry ; and (iii) for what period, not exceeding three years, the tariff or other measures recommended should remain in force. In making its recommendations, the Board has to give due weight to the interests of the consumer in the light of the prevailing conditions and also consider how the recommendations affect industries using the articles in respect of which protection is to be granted.

3. On the 30th July 1946 the Board issued a press communiqué inviting
Method of Inquiry all interests connected with the industry including importers and consumers who wished their views to be considered to submit their representations. The Board also issued a detailed questionnaire. Appendix I contains the list of associations and persons to whom the questionnaire was issued and from whom replies or memoranda were received. One of the Members of the Board, Dr. Nazir Ahmad, visited the factory of the Textile Machinery Corporation at Balghurriah and the Kesoram Mills in which a few spinning frames made by Texmaco were working. Our Technical Adviser and Cost Accounts Officer visited this factory and also the factory of the Acme Manufacturing Co., Ltd., Bombay. The public inquiry was held at Bombay on the 18th March 1947. Appendix II contains the list of persons who were invited for giving evidence at the public inquiry, and Appendix III contains the list of persons who actually responded to this invitation.

4. The Textile Machinery Corporation, Ltd., was registered as a public limited company in 1939. Though it commenced work in April 1941, the production programme was interrupted on account of the factory being requisitioned for war purposes by Government in 1942. The factory was handed back to the company by Government in December 1945, and production of textile machinery was undertaken soon after. The company has a paid-up capital of one crore of rupees. Besides ring frames, spinning rings and spindles, the company proposes to manufacture other textile machinery including bleaching and dyeing machines. The factory is well equipped and has on its staff 14 British experts. Besides the Textile Machinery Corporation, Ltd., two other concerns for manufacturing cotton textile machinery were started during the war, viz., the Acme Manufacturing Co., Ltd., Bombay, and Textools, Ltd., Coimbatore. Recently plans have been completed for starting another factory in the Western Presidency in collaboration with the Textile Machinery makers of England.

5. The most authoritative estimate of the Indian demand for cotton textile machinery is the one made by the Post-war Planning Committee (Textiles). This Committee based its estimate on the present production of 4,800 million yards of cotton textiles and the estimated target production of 7,200 million yards per year. Out of the proposed increase of 2,400 million yards of cloth under the post-war plan, the Committee anticipated an increase in the production in the immediate future of 1,700 million yards. On this basis the Committee has estimated the additional requirements of cotton spinning machinery during the next five years as follows :—

	Million spindles
(a) Additional spindles required to attain the increase in production of 1,700 million yards	2.75
(b) Spindles for balancing	1.00
(c) Estimated replacement of machinery, requirement during the next five years	3.50
Total requirement of spinning machinery during the next five years ..	7.25

This estimate was accepted by all the witnesses who were present at our inquiry, and in fact some of them were of the opinion that the estimate should be considered as a conservative one. It will thus be seen that there is a very large home demand for cotton textile machinery in the immediate future.

6. It is not necessary for our purpose to go into the question of the volume of imports of cotton textile machinery in the past. What is of immediate concern is how far the Indian demand will be met by imports. In the pre-war years most of the imports came from the United Kingdom. The other countries from which imports came on a relatively small scale are Germany, Switzerland, Japan, China and U.S.A. The United Kingdom would be the main source of supply for the present, though some imports might be expected from U.S.A. and Switzerland.

7. It is difficult to forecast the exact volume of imports that may be expected to come into the country during the next few years. There is a large demand for textile machinery in many countries of the world but the exportable surplus of the manufacturing countries is limited. The Indian Textile Engineers Ltd., Bombay, who represent a combination of British manufacturers of textile machinery, have given us the following information relating to the anticipated imports from this group of manufacturers during the next three years :—

				<i>Spindles</i>
1947	..	..	750 ring frames of 400 spindles each	.. 300,000
1948	..	..	1,000 Do.	.. 400,000
1949	..	..	1,250 Do.	.. 500,000
Total anticipated imports during the next 3 years—3,000 ring frames of 400 spindles each .. .. .				.. 12,00,000

For spares and/or replacements it is expected that during the next three years there may be an import of about 425,000 spindles and 400,000 rings per annum. These are apart from the indicated import of spindles and rings included in the ring frames referred to above. In the United Kingdom there are other manufacturers of textile machinery who are outside this combination. It is likely that some ring frames and other textile machinery may be imported from these sources also. It has not, however, been possible to find out exactly how many, spindles are likely to be obtained from these manufacturers.

8. The Textile Machinery Corporation has manufactured only ten ring frames during the year 1946 in addition to 73,097 rings and 25,749 spindles for replacement. All the component parts of the ring frame except lappets were manufactured by the company itself. The Textools Ltd. manufactured only 8 ring frames during 1946. This company has manufactured all the component parts except the rings and lappets which were imported. The Acme Manufacturing Co. have not yet produced any complete ring frame. Following is the programme of production which these companies have in view : The Textile Machinery Corporation expects to manufacture during 1947 complete ring frames aggregating 60,000 spindles. From 1948 onwards this company expects to manufacture complete ring frames aggregating 1,20,000 spindles per annum in addition to another 1,20,000 spindles for replacement. Textools Ltd. expect to manufacture ring frames aggregating about 14,000 spindles in 1947 and about 19,000 spindles per annum from 1948 onwards. The Acme Manufacturing Co. expect to produce ring frames aggregating to about 25,000 spindles in 1947 and 1,28,000 spindles per annum from 1948 onwards. In addition to these three companies which are already established and which have started production, the new Indian company which is being formed in association with the Textile Machinery makers of England expects to manufacture ultimately about 40,000 spindles per month. This company has already taken steps for the erection of the requisite buildings and expects to go into production in the near future.

9. Very few ring frames have so far been manufactured in India and even these have not yet been tested for a sufficiently long period under normal working conditions in a textile mill. The Textile Machinery Corporation informed us that some of their spinning frames were working at the Kesoram Cotton Mills. We deputed two technical experts to examine these frames. They have submitted to us a detailed report covering various technical aspects. They sum up their opinion as follows : " We think the results are excellent and encouraging. There is room for improvement, but we realise that labour cannot be trained to English standards within the short time that Texmaco has operated in this branch of engineering." Some of the ring frames manufactured by Textools Ltd. were examined by two technicians deputed by Sir James Doak of the Madura Mills Ltd. In a communication addressed to the Textile Commissioner, Bombay, Sir James Doak observes : " I cannot do better than enclose copies of two separate reports made by two of our technical staff from which it would appear that the ring frames are quite satisfactory. These frames have of course been running for a comparatively short time, but there is no reason to assume that they would not have a reasonable life." There is thus every reason to believe that ring frames of high quality can be produced in the country.

10. The principal raw materials required for the manufacture of ring frames, spindles and rings are pig iron, black steel bars, bright drawn steel bars, tin sheets, steel tubes and certain other non-ferrous metals such as brass, aluminium and nickel, and wood. Other main consumable stores are hard coke and high speed steel. Most of the raw materials are either already available in the country or can be made available in the near future. At present steel tubes and steel bars for spindle blades and tin sheets of the proper quality are not available in the country. In view of the high efficiency that the steel industry in India has already attained, we do not think there should be any difficulty in producing all these materials in the near future. It would thus be seen that practically all the raw materials required for the industry are available in the country itself.

11. Ring frames, spindles and spinning rings are not separately shown in the Tariff Schedule. They are included under item 72(1) of the first Tariff Schedule and are subject to an *ad valorem* revenue duty of ten per cent.

12. According to the information given by the Indian Engineers Ltd., Bombay, the present landed cost of a ring frame of 400 spindles is Rs. 20,809 inclusive of the customs duty of ten per cent *ad valorem*. This cost is made up as follows :--

	Rs.
C. i. f. price	18,747
Landing and clearing charges	187
Customs duty at 10 per cent	1,875
Total	20,809

Another importing firm which represents certain manufacturers outside the U.K. combine has given the present landed cost with duty of a similar frame

as Rs. 25,200. The cost of an approximately similar frame imported from Switzerland will come to about Rs. 38,080 at present, inclusive of duty. The figures given above represent the prevailing prices for current imports. The manufacturers invariably insert in their contracts a price variation clause relating to possible wage increase in the United Kingdom, and it is not therefore possible to say exactly what will be the cost of future imports. The opinion of the importers is that there is no likelihood of the present level of costs being reduced, but that on the contrary there is every possibility of an increase in prices. The landed cost with duty of spindles is about Rs. 6.9 per spindle and of spinning rings about Rs. 1.4 per ring.

13. As mentioned in paragraph 8, the Textile Machinery Corporation has produced only 10 ring frames during the year 1946 in addition to 73,097 rings and 25,749 spindles. The Indian Cost of Production Textools Ltd. have manufactured only 8 ring frames. The Acme Manufacturing Co. have not yet manufactured any complete frames. Obviously it is not possible to make any reasonable estimate of costs based on such a small volume of production. The representatives of the Textile Machinery Corporation have agreed that any attempt to determine the actual cost of production for 1946 even on a rough basis would serve no useful purpose, because such costs would admittedly be extremely high on account of the low production, and would not therefore be of a representative character. Textools Ltd. have however given more definite information regarding their cost of production. This company is concentrating on the manufacture of ring frames, and according to its accounts the actual cost of a ring frame inclusive of profit and selling expenses is Rs. 16,938. According to the estimate of future costs made by this company, it is expected that the cost of a ring frame in 1947-48 will be about Rs. 15,569 and in 1948-49 about Rs. 15,511.

14. The Tariff Board always bases its recommendations for protection on a comparison of domestic cost with the price of the Claim of the Industry for Assistance Examined. import. The domestic cost taken for this purpose should not be a mere estimate, but has to be based on the actual production of a reasonable output. This essential criterion regarding domestic costs is not available at present, because the volume of production is still almost negligible. In the absence of these data, the Board is unable to come to any conclusion as to whether or not a case has been made out for protection. The request of the Textile Machinery Corporation really comes to this. When the company reaches its peak production it expects to market its products in competition with the imports. During the first two years when its production is on a low level, it would be incurring some loss and it requests that at least a portion of this loss should be covered by the grant of a subsidy. In other words, the company asks for a State subsidy to cover the inevitable losses arising in the early stages of building up the industry. The Tariff Board cannot entertain such a request which in effect is a claim for subsidy for developmental purposes rather than for meeting foreign competition. In so far as the company is unable to furnish precise data of cost of production on a commercial scale, the application for protection or assistance is premature.

15. The vital importance of the textile machinery manufacturing industry for the economic set-up of the country cannot be denied. The textile industry is the largest industry in the country catering for one of the essential needs. It is essential that machinery for this industry should be manufactured in the country itself. There is a vast home market for the machinery and practically all the raw materials are available in the country. The industry therefore enjoys natural advantages and is an important one from the point of view of national interest. If it can be proved on the basis of definite data regarding costs that the Indian manufacturer cannot compete with the foreign manufacturer in the domestic market, there would be a strong case for assisting the industry in some suitable manner. At the present stage, we have come to the conclusion that the inquiry should be postponed and taken up again early in 1948. In the meantime, we expect that the manufacturers would produce a reasonable output and maintain their accounts in such a manner as to enable the cost of production to be examined more accurately. In this connection, the cost of production given by the Textools Ltd. and referred to in paragraph 13 deserves to be carefully noted. With the modest equipment that the Textools Company has, it has manufactured some ring frames at a cost of Rs. 16,938 per frame. According to the statement of the representative of the company, all the component parts of the frame except rings and lappets were made by the company. This experience indicates that the Indian manufacturer should be in a position to make ring frames at competitive prices.

16. In the course of the Tariff Board inquiries it becomes necessary to find out the volume of imports of the products for which protection is asked. In the present inquiry for instance it is important to know the number of spinning frames imported. In the import statistics given in the Accounts relating to the Sea-borne Trade and Navigation in British India, sufficient details are not given. Cotton textile machinery is now shown in the above-mentioned document under the following categories :—

- (a) bleaching and dyeing machinery,
- (b) printing machinery,
- (c) spinning machinery,
- (d) weaving machinery,
- (e) other sorts.

We recommend that spinning and weaving machinery should be further subdivided as follows :—

Spinning machinery—

- (a) blow room machinery,
- (b) cards,
- (c) speed frames (including drawing),
- (d) spinning frames,
- (e) doubling frames.

Weaving machinery—

- (a) winding machines,
- (b) warping machines,
- (c) looms.

We have been told that there would be no difficulty for the customs authorities of the various ports in India to keep records of individual machines under the above heads. We therefore recommend that in the Accounts relating to the Sea-borne Trade and Navigation of British India, spinning and weaving machinery should be shown under the aforesaid classifications.

Summary.

17. Our conclusions may be summarised as follow :—

- (i) There is a very large home demand for cotton textile machinery in the immediate future. (Paragraph 5).
- (ii) There is every reason to believe that ring frames of high quality can be produced in the country. (Paragraph 9).
- (iii) Practically all the raw materials required for the industry are available in the country. (Paragraph 10).
- (iv) It is not possible to make any reasonable estimate of costs based on the very small volume of production so far achieved in the country. (Paragraph 13).
- (v) The application for protection is premature for want of the necessary data regarding the domestic cost of production. (Paragraph 14).
- (vi) The enquiry should be postponed and taken up again early in 1948. (Paragraph 15).
- (vii) We recommend that in the Accounts relating to the Sea-borne Trade and Navigation of British India, spinning and weaving machinery should be subdivided into the various categories referred to in paragraph 16.

18. The Board wishes to express its thanks to Mr. Dharma Vira, O.B.E. I.C.S., Textile Commissioner, Mr. Krishnaraj M. D. Thackersey, Chairman of Textile Control Board, Sir Frederick Stones and Messrs. T. Ashworth and S. S. China for the valuable assistance that they gave in this inquiry, and to Mr. P. V. Raghava Rao, Cost Accounts Officer, Mr. R. N. Kapur, Technical Adviser, Rai Sahib S. C. Aggarwal, Deputy Secretary, and Dr. Rama Varma, Assistant Secretary, for the work that they did during all the stages of the inquiry.

SHANMUKHAM CHETTY,
President.

NAZIR AHMAD,
Member.

S. C. AGGARWAL,
Deputy Secretary.

Bombay, 9 April 1947.

APPENDIX I.

(Vide paragraph 3).

List of firms, associations or persons to whom the questionnaire was issued.

[Those who have replied to the questionnaire or furnished memoranda are marked by an asterisk (*)].

A. Producers.

- *1. Textile Machinery Corporation Ltd., Belghurriah, (Calcutta).
- *2. Textool Company Limited, Coimbatore.
- 3. The Acme Manufacturing Co. Ltd., Bombay.
- 4. The Cooper Engineering Co. Ltd., Satara Road, M. S. M. Railway.
- 5. Achalpur Engineering Works Ltd., Ellichpur, C. P. & Berar.

B. Importers.

- *1. The Elgin Mills Co. Ltd., Cawnpore.
- *2. Volkart Brothers, Bombay.
- *3. Indian Textile Engineers Ltd., Bombay.
- *4. The Star Trading Co. Ltd., Bombay.
- 5. The Marketing Corporation of India, New Delhi.
- 6. Gannon Dunkerley & Co. Ltd., Bombay.
- 7. Greaves Cotton & Co. Ltd., Bombay.
- 8. Textile & General Supplies Ltd., Bombay.
- 9. The Textile Supplies Syndicate (India) Ltd., Bombay.
- 10. S. Nagarmall, Esq., Calcutta.
- 11. Modi & Modi, Madras.
- 12. Eastern Electrical Co. Ltd., Coimbatore.
- 13. W. H. Brady & Co. Ltd., Bombay.
- 14. Begg Sutherland & Co. Ltd., Cawnpore.

C. Consumers.

- *1. Morarji Goculdas Spg. & Wvg. Co. Ltd., Bombay.
- *2. Southern India Millowners' Association, Coimbatore
- *3. The Tata Mills Ltd., Bombay.
- *4. The Mohini Mills Ltd., Nadia, Bengal.
- *5. The Century Spg. & Mfg. Co. Ltd., Bombay.
- *6. The Punjab Textile Mills Ltd., Lahore.
- *7. Bharat Jute Mills Ltd., Calcutta.
- *8. The Krishna Kumar Mills Co., Ltd., Kathiawar.
- *9. The Surat Cotton Spg. & Wvg. Mills Ltd., Bombay
- *10. New Pralhad Mills Ltd., Bombay.
- *11. Kamala Mills Ltd., Bombay.
- *12. Luxmi Spg. & Wvg. Mills Ltd., Bengal.
- *13. The India United Mills Ltd., Bombay.
- *14. The Model Mills Nagpur, Ltd., Nagpur City
- *15. The Burhanpur Tapti Mills Ltd., Bombay.
- *16. The Khandesh Spg. & Wvg. Mills Co. Ltd., East Khandesh.
- *17. Sirur & Co. Ltd., Bombay.
- *18. Central India Spg., Wvg. & Mfg. Co., Ltd., Nagpur.
- *19. Mahalaxmi Cotton Mills Ltd., Calcutta.
- *20. The Rajkot Spg. & Wvg. Mills Ltd., Rajkot.

- *21. The Bangalore Woollen, Cotton & Silk Co., Ltd., Bangalore City.
- *22. The Maharana Mills Ltd., Porbandar, Kathiawar.
- *23. Nagri Mills Co., Ltd., Ahmedabad.
- *24. The Walchandnagar Industries Ltd., Walchandnagar.
- 25. The Cawnpore Lace Works Ltd., Bombay.
- 26. Shri Jagdish Mills Ltd., Baroda.
- 27. S. Nagarmall Esq., Calcutta.
- 28. Atherton West & Co., Ltd., Cawnpore.
- 29. Srinivas Mills Ltd., Madura.
- 30. The Kohinoor Mills Co., Ltd., Bombay.
- 31. Eastern Electrical Co., Ltd., Coimbatore.
- 32. Sir Dhanjishah B. Cooper, Satara.
- 33. Begg Sutherland & Co., Ltd., Cawnpore.

D. Associations.

- *1. Textile Machinery & Accessories Industrial & Export Group Manchester (General Memorandum).
- 2. The Textile Stores & Machinery Merchants' Association, Bombay.
- 3. The Federation of Baroda State Mills & Industries, Baroda.
- 4. The Ahmedabad Millowners' Association, Ahmedabad.



APPENDIX II.

(vide paragraph 3).

List of persons who were invited to be present at the public enquiry.

A. *Producers.*

1. Textile Machinery Corporation Ltd., Belghuriah (Calcutta).
2. Textool Co. Ltd., Coimbatore.
3. The Acme Manufacturing Co., Limited, Bombay.
4. Achalpur Engineering Works, Ltd., Ellichpur, C.P. & Berar.

B. *Importers.*

1. Volkart Brothers, Graham Road, Bombay.
2. The Marketing Corporation of India, New Delhi.
3. Gannon Dunkerley & Co. Ltd., Bombay.
4. Tweedales and Smalley Ltd., Bombay.
5. Indian Textile Engineers Ltd., Bombay.
6. The Textile & General Supplies Ltd., Bombay.
7. W. H. Brady & Co., Ltd., Churchgate St., Bombay.
8. Greaves Cotton & Co., Ltd., Bombay.

C. *Consumers*:—Nil (as the products of the “TEXMACO” have not been supplied to any mills except to one of the mills owned by the managing agents of Texmaco).

D. *Associations.*

1. The Textile Stores & Machinery Merchants Association, Bombay.

E. *Officials and others.*

1. Krishnaraj M. D. Thackersey, Esq., Chairman, Textile Control Board, Bombay.
2. Dharma Vira Esq., O.B.E., I.C.S., Textile Commissioner, Bombay.
3. T. P. Barat, Esq., Joint Textile Commissioner, Bombay.
4. Mr. Fakirjee E. Barucha, 12, Club Road, Seculla.



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APPENDIX III

(Vide paragraph 3.)

List of persons who were present at the public enquiry.

I. *Producers.*

1. Mr. E. DaCosta,	representing	Textile Machinery Corpn., Bel-
„ Viswanathan,		ghuarriah, Calcutta.
„ P. L. Kapur.		
2. Mr. Lalchand	„	The Acme Manufacturing Co.,
Hirachand,		Ltd., Bombay.
„ Bharat		
„ Gulabchand,		
„ C. S. Bhagwat.		
3. Rao Sahib N. V. Deshpande	„	Achalpur Engineering Works
		Ltd., Ellichpur (C.P. & Berar).
4. Mr. Balasundaram	„	Textool Co., Ltd., Coimbatore.

II. *Importers.*

1. Mr. P. P. Nadkar	„	Gannon Dunkerley & Co., Ltd.
		Bombay.
2. Mr. Plazard	„	Greaves Cotton & Co., Ltd.
		Bombay.
3. Mr. J. C. Morton	„	Tweedales & Smalley Ltd.,
		Bombay & Indian Textile
		Engineers Ltd., Bombay.
4. Mr. M. D. Mehta	„	Star Trading Co., 14, French
		Bridge Chowpatty, Bombay.
5. Mr. H. K. Tutton	„	Ormerods (India) Ltd. Bombay.

III. *Consumers.*

1. Mr. Nandulal Mehta	„	The India United Mills Ltd.
		Bombay.
2. Mr. Katrak	„	Khatau Makanji Mills, Ltd.,
		Bombay.
3. Mr. Borker	„	Bradbury Mills Ltd., Bombay.

IV. *Associations.*

1. Mr. H. S. Bhagwati &	„	The Textile Stores & Machinery
„ R. S. Desai		Merchants' Association, Bom-
		bay.
2. Mr. Sankalchand G. Shah,	„	The All India Manufacturers
Vice President.		Organisation, Bombay.

V. *Officials & Others.*

1. Mr. Dharma Vira, O.B.E., I.C.S., Textile Com-		
missioner, Government of India, Bombay.		
2. Mr. T. P. Barat, Joint Textile Commissioner,		
Government of India, Bombay.		
3. Mr. Krishnaraj M. D. Thackersey, Chairman,		
Textile Control Board, Bombay.		
4. Sir Frederick Stones.	}	E. D. Sassoon & Co., Ltd., Bombay.
5. Mr. T. Ashworth.		
6. Mr. S. S. China.		



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